

FORM PTO-1449 (REV. 7-80)		U.S. DEPARTMENT OF COMMERCE PATENT AND TRADEMARK OFFICE		ATTY. DOCKET NO.: 53326.000008		SERIAL NO.: 09/520,763	
LIST OF MATERIALS CITED BY APPLICANT <i>APPLICANT JUN 16 2000</i>				INVENTOR'S NAME: Comiskey et al.		EXAMINER: Not yet assigned	
(Use several sheets if necessary)				FILING DATE: 03/08/00		GROUP: Not yet assigned	
<b>U.S. PATENT DOCUMENTS</b>							
*EXAMINER INITIAL		DOCUMENT NUMBER	DATE	NAME	CLASS	SUBCLASS	FILING DATE
	A						
	B						
	C						
<b>FOREIGN PATENT DOCUMENTS</b>							
	D	DOCUMENT NUMBER	DATE	COUNTRY	CLASS	SUB-CLASS	TRANSLATION
							YES      NO
<b>OTHER MATERIALS (Including Author, Title, Date, Pertinent Pages, Etc.)</b>							
DPC	E	U.S. Trust News (visited 6/12/00) < <a href="http://www.ustrust.com/news050100.htm">http://www.ustrust.com/news050100.htm</a> >					
DPC	F	citi Welcome (visited 6/12/00) < <a href="http://www.citibank.com/domain/navhome.htm">http://www.citibank.com/domain/navhome.htm</a> >					
DPC	G	Global Corporates and Institutions (visited 6/12/00) < <a href="http://www.db.com/central/ver40/index.html">http://www.db.com/central/ver40/index.html</a> >					
DPC	H	S1 Empowering financial institutions to improve their customers' world (visited 6/12/00) < <a href="http://www.s1.com">http://www.s1.com</a> >					
DPC	I	How do you get there? (visited 6/12/00) < <a href="http://morganonline.com/home.html">http://morganonline.com/home.html</a> >					
DPC	J	Spotlight (visited 6/12/00) < <a href="http://www.ml.com">http://www.ml.com</a> >					
DPC	K	YourWITAN.com (visited 6/12/00) < <a href="http://www.yourwitan.com/home.html">http://www.yourwitan.com/home.html</a> >					
DPC	L	VIP Private Capital (visited 6/12/00) < <a href="http://www.vipprivatecapital.com/home.html">http://www.vipprivatecapital.com/home.html</a> >					
DPC	M	Overview (visited 6/12/00) < <a href="http://www.bessemer.com/WebSite/Content/Wealth.../WealthManagement.asp6/12/00&amp;Graphic=WealthManagement">http://www.bessemer.com/WebSite/Content/Wealth.../WealthManagement.asp6/12/00&amp;Graphic=WealthManagement</a> >					
DPC	N	Financial Navigator International (visited 6/12/00) < <a href="http://www.finnav.com">http://www.finnav.com</a> >					
DPC	O	Financeware.com (visited 6/12/00) < <a href="http://fplanauditors.com/default.asp">http://fplanauditors.com/default.asp</a> >					
DPC	P	The Burgiss Group (visited 6/12/00) < <a href="http://www.burgiss.com">http://www.burgiss.com</a> >					
DPC	Q	FMC Financial Models (visited 6/12/00) < <a href="http://www.fmco.com/fmc/noframes/index.htm">http://www.fmco.com/fmc/noframes/index.htm</a> >					
DPC	R	Solutions for (visited 6/12/00) < <a href="http://www.bankofny.com">http://www.bankofny.com</a> >					
DPC	S	Market Snapshot: Stocks look to data for direction (visited 6/12/00) < <a href="http://www.quicken.com">http://www.quicken.com</a> >					
DPC	T	UBS (visited 6/12/00) < <a href="http://www.ubs.com/e/private_clients.html">http://www.ubs.com/e/private_clients.html</a> >					
EXAMINER <i>Dulal Alayna</i>		DATE CONSIDERED <i>8/18/02</i>					
*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609; Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.							

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LIST OF MATERIALS CITED BY APPLICANT <i>JUN 16 2000</i> (Use several sheets if necessary)		INVENTOR'S NAME: Comiskey et al.		EXAMINER: Not yet assigned			
				FILED DATE: 3/08/00	GROUP: Not yet assigned		
<b>U.S. PATENT DOCUMENTS</b>							
*EXAMINER INITIAL		DOCUMENT NUMBER	DATE	NAME	CLASS	SUBCLASS	FILED DATE
	A						<i>JUL 20 2000</i>
	B						<i>RECEIVED</i>
	C						<i>TC 2700 MAIL ROOM</i>
<b>FOREIGN PATENT DOCUMENTS</b>							
	D	DOCUMENT NUMBER	DATE	COUNTRY	CLASS	SUB-CLASS	TRANSLATION
							YES      NO
<b>OTHER MATERIALS (Including Author, Title, Date, Pertinent Pages, Etc.)</b>							
<i>DEC</i>	E	Sanwa Internet Banking 2000 (visited 6/12/00) < <a href="http://www.sanwabank.co.J. P. Sumner, Esq./contents.html">http://www.sanwabank.co.J. P. Sumner, Esq./contents.html</a> >					
<i>DEC</i>	F	Financial Service Department (visited 6/12/00) < <a href="http://www.rsco.com/financial_services/priv_client_svcs.htm">http://www.rsco.com/financial_services/priv_client_svcs.htm</a> >					
<i>DEC</i>	G	Private Banking Services (visited 6/12/00) < <a href="http://www.fleet.com/bkpppb.html">http://www.fleet.com/bkpppb.html</a> >					
<i>DEC</i>	H	PNC Advisors (visited 6/12/00) < <a href="http://www.pncadvisors.com/index.cfm">http://www.pncadvisors.com/index.cfm</a> >					
<i>DEC</i>	I	Northern Trust (visited 6/12/00) < <a href="http://www.northerntrust.com/personal_services/index.html">http://www.northerntrust.com/personal_services/index.html</a> >					
<i>DEC</i>	J	Mellon Private Banking (visited 6/12/00) < <a href="http://www.mellon.com/personal/private">http://www.mellon.com/personal/private</a> >					
<i>DEC</i>	K	Julius Baer - The Fine Art of Private Banking (visited 6/12/00) < <a href="http://www.juliusbaer.com/priv_bank/r2.html">http://www.juliusbaer.com/priv_bank/r2.html</a> >					
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EXAMINER <i>Oliver Charles</i>		DATE CONSIDERED <i>8/18/02</i>					
<p>*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609; Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.</p>							